

DocRoute

Banner Finance Security Form



Instructions for using DocRoute Banner Finance Security Form

Navigate to Faculty and Staff Logins page of the USA Website and expand Faculty/Staff Applications A-Z at the left. Click on Document Routing (DocRoute):

The screenshot shows the 'Faculty & Staff Logins' page. On the left, there is a navigation menu with 'Faculty/Staff Applications A-Z' expanded. The main content area is titled 'Faculty-Staff Applications A-Z' and features a search bar and a list of applications. The 'Document Routing (DocRoute)' application is highlighted in yellow at the bottom of the list.

| Login Link | Application Information |
|---|---------------------------|
| Advising Manual (JagNet SSO) | |
| Agreement Approval & Tracking (JagNet) | More Info |
| Amazon Business (SSO) | |
| Banner 9 Admin Pages (JagNet SSO) | |
| Banner 9 Admin Test PREP (JagNet SSO) | |
| EINX (JagNet SSO) | |
| TEST (TBD) | |
| TRNG (JagNet SSO) | |
| Banner Enroll (JagNet SSO) | |
| Campus Events (JagNet) | More Info |
| Covuse Research Suite | More Info |
| CQI Risk Manager | More Info |
| Concur Travel (JagNet SSO) | More Info |
| Course Evaluations & Surveys (JagNet SSO) | More Info |
| CourseLeaf CAT (Bulletin Changes) | More Info |
| CourseLeaf CIM (Curriculum Changes) | More Info |
| DegreeWorks PREP Dashboard (JagNet SSO) | |
| Document Routing (DocRoute) | |

At the prompt, enter your Jag Number and SSO password:

The screenshot shows the DocRoute login page. It includes a title 'DocRoute', a description of the system, and a login form with two input fields: 'Jag Number' and 'Password'. Both fields have red error messages: 'Invalid Jag Number' and 'Password is required.' respectively. A 'Login' button is located at the bottom right of the form.

DocRoute

This is the USA Document Routing system. It is used for tracking and approval of many different processes. If you would like to make a new request or review an existing request please login with your JagNet credentials below.

Jag Number

Jag Number is required.
Invalid Jag Number

Password

Password is required.

Login

Expand "Finance & Administration" on the left and choose "Banner Security Form." Click "Add New Request:"

continued

Add New Request

Agreement Review

Computer Center

Finance & Administration

Human Resources

Policy

Students

Help

Logout

Browse Requests

My relationship to the request: All requests

Status: In Process Canceled Complete Denied

Search by ID/Name/Jag Number: (optional)

Submit Date Range: (optional)

Search

| ID | Status | Jag Number | Employee | Department | Title | Submit Date |
|----|--------|------------|----------|------------|-------|-------------|
|----|--------|------------|----------|------------|-------|-------------|

Enter a Jag Number or an email address, then click on Search. This form will allow you to request Banner Security for yourself, or on behalf of another employee. The fields in gray will prefill.

Created By: Jane Doe

Create Date: 12/8/2023 10:38:58 AM

Employee

Employee *

Enter a jag Number or email address

Search

| Jag Number | Name | Title |
|------------|----------|-----------------------------|
| J00123456 | Jane Doe | Computer Systems Analyst II |

| Department Code | Department Name | Email |
|-----------------|--------------------------|-----------------------|
| 140210 | Computer Services Center | jdoe@southalabama.edu |

Banner Account Status

Jag number not associated with a Banner ID (THIS APPEARS IF EMPLOYEE DOES NOT CURRENTLY HAVE A BANNER ID)

--- OR ---

Banner Account Status

Enter the Department Head/Approving Supervisor's Jag Number or email address. The gray areas will prefill.

Department Head or Approving Supervisor

Supervisor *

Enter a jag Number or email address

| Jag Number | Full Name | Email |
|------------|-------------|-----------------------------|
| J00234567 | Sarah Smith | sarahsmith@southalabama.edu |

Requesting NEW ACCESS

Details

Requested Action *
Create a new account and assign security items

Contact Phone *
251-555-5555

Additional Notes / Comments

Security Type
Security Type *
Finance

Banner Finance Access Type *
Create Requisitions & E-Print
Approver & E-Print
Create Requisitions Only
Approver Only
E-Print Only

Banner Finance Specific Organization Access
Add ORGN/FUND Access

ORGN Code
No records found

FUND Access

If the user is requesting new access, the only option available in the "Requested Action" drop-down is "Create a new account and assign security items." Add a phone number where you can be reached in the next field. Choose "Finance" from the drop-down for "Security Type." Choose one of the options in the "Banner Finance Access Type." This field corresponds to section 5 on the previous paper form:

5. Type of Access:

Create Requisitions Approver (Limit: _____) E-Print Budget Query ID-Search

Next, click on "Add ORGN/FUND Access" button to indicate which Organizations and Funds you need access to:

For each ORGN, you have three options pictured to the right. If you choose "All Grants for PI," please list the PI's name and Jag Number in the "Additional Notes/Comments" field before submitting the form.

Details
Add Finance ORGN/FUND Access

Requested Action *
Create a new account and assign security items

Additional Notes / Comments

Organization Code *
172100

Access *
All FUNDS for this ORGN
All Grants for P.I.
Individually List FUND codes

Security Type
Security Type *
Finance

Banner Finance Specific Organization Access
Add ORGN/FUND Access

Security Access Description is required

Next, choose the “Security Source.” You can either request us to copy from an existing employee or describe what type of access you need in the box provided:

Security Source

Security Source *

Copied from an existing employee

User to Copy

Enter a Jag Number or email address Search

| Jag Number | Name | Title |
|-----------------|-----------------|---------------------------|
| J00345678 | John Bond | Supervisor |
| Department Code | Department Name | Email |
| 172100 | Business Office | johnbond@southalabama.edu |

----- OR -----

Security Source

Security Source *

Described below

Describe the Access You Need *

I need general Banner Finance access and also need access to run ZFGR0036 Budget Status Report.

Once you are done, read the attestation at the bottom and click on “Submit.” Your request will process through the appropriate approval queues and you will be notified once your Banner Finance access has been set up.

CHANGING YOUR EXISTING BANNER FINANCE ACCESS:

Here is an example of someone who already has Banner Finance access, but has transferred to another department and needs access to different Organizations, Funds and reports. You can also choose the option to copy an existing user's access under "Security Source" (not pictured, see instructions in new Banner users section):

Details

Requested Action * **Contact Phone ***

Additional Notes / Comments

Security Type

Security Type * **Banner Finance Access Type ***

Banner Finance Specific Organization Access

| ORGN Code | FUND Access | |
|-----------|-------------------------|---------------------------------------|
| 420100 | All FUNDS for this ORGN | <input type="button" value="Delete"/> |
| 420300 | 273385, 273388, 273415 | <input type="button" value="Delete"/> |

Security Source

Security Source *

Describe the Access You Need *

Managers can also use this form to request Banner access to be removed for terminated employees:

Details

Requested Action * **Contact Phone ***

Additional Notes / Comments

By submitting or approving this request I understand that, I may be given access to one or more administrative computer systems. The information contained in these records is of a private and confidential nature and I acknowledge it is my responsibility to maintain the privacy of these records.

I have read the University's [Information Systems Security Policy](#) and understand all the requirements and guidelines stated therein. I understand that I am responsible for my use of passwords which I have been given and that I will be held accountable for any invalid use of my user identification. I further acknowledge that my failure to follow these guidelines will subject me to disciplinary action up to and including dismissal and possible legal action.

If you have any questions or need assistance completing the form, please call the Business Office at 251-460-6241 and we will be glad to help.